

NES one User Guide

Instruction Manager

1. Introduction

This User Guide outlines how to use the Instruction Manager functionality within the NES one system. After a general description of Instruction Manager there are two main sections:

- Instruction Manager for the client
- Instruction Manager for the assessor

The first – **Instruction Manager for the client** – covers how to use this system as a provider of EPC and other report instructions to Domestic Energy Assessors (DEAs), Home Inspectors (HIs) On Construction DEAs (OCDEAs), Commercial Energy Assessors (CEAs) and Public Building Energy Assessors (PBEAs). In other words it is Instruction Manager from the perspective of the estate agent, letting agent, conveyancer, landlord, etc. Hereafter in this document these users will be called clients.

The second section – **Instruction Manager for the assessor**– describes how DEAs, HIs, OCDEAs, CEAs and PBEAs use the system. Hereafter in this document these users will be called assessors.

Contents

2. General Description
3. Instruction Manager for the client
 - 3.1 Getting started
 - 3.2 Offering a new instruction
 - 3.2.1 Instruction
 - 3.2.2 Instruction address
 - 3.2.3 Contacts
 - 3.2.4 Notes
 - 3.3 Instruction management/statuses
 - 3.3.1 Viewing instructions
 - 3.3.2 Instruction details
 - 3.4 Managing the instruction/statuses

- 3.5 Receiving the EPC or report
- 3.6 Personal details – My Account
- 4. Instruction Manager for the assessor
 - 4.1 Setting up a new client/relationship
 - 4.1.1 Viewing clients already set up
 - 4.1.2 Adding a client
 - 4.2 Receiving a new instruction
 - 4.3 Making the appointment
 - 4.4 Writing the EPC or report and delivering it to the client
- 5. Managing relationships
 - 5.1 Managing relationships – the assessor perspective
 - 5.2 Managing relationships – the client perspective
 - 5.2.1 Adding a new assessor
 - 5.2.2 Removing an assessor
 - 5.2.3 Re-activating an assessor

2. General description

Instruction Manager (IM) enables assessors' clients, for example estate agents, letting agents and conveyancers, to offer instructions to provide EPCs, HCRs and other reports to assessors. IM achieves this by allowing assessors to set up electronic relationships with their clients (as many relationships as they wish) and via these link ups the client offers instructions to the assessor, who can accept or reject the instruction. Essentially IM streamlines the process of issuing and managing jobs.

Once the instruction is accepted it is then managed via IM. As the instruction progresses various statuses are set, for example "Appointment" made and these statuses are both summarised and detailed, and are viewable by both the client and the assessor. At all times both parties know the point the job has reached and can see exactly what is happening. Notes can be added to the job at any point by either party. At the end of the process the EPC, or other report as commissioned, is delivered to the client automatically.

If you are providing instructions to assessors etc. please read section 3 below.

If you are an assessor please go, in particular, to section 4, but do read section 3 as well as this section covers introductory material such as what constitutes an instruction, how to filter the list of instructions and the basics of instruction status.

3. Instruction Manager for the client

The client is set up in the first instance by the assessor but once set up they manage the relationship. This section describes how the client is set up initially, and how they offer and manage instructions.

3.1 Getting started

The assessor initiates the relationship. (See section 4.1.2 Adding a client). They set up the client's login and in setting up this login generate an automatic email to the client that gives them all the details they need to log in. An example of this email is shown here (note this is a sample mail):

Andy Spencer,

You have been registered to use the NES one Service. Your login was setup by
Andrew Smith

Web site	www.nes-one.co.uk
Username:	andy.spencer@boltblue.com
Entry word:	xxxxxxx

Please change this entry word to something more memorable when you login. Once you login you will find a help guide under the 'Getting started' link in the 'Useful Documents'

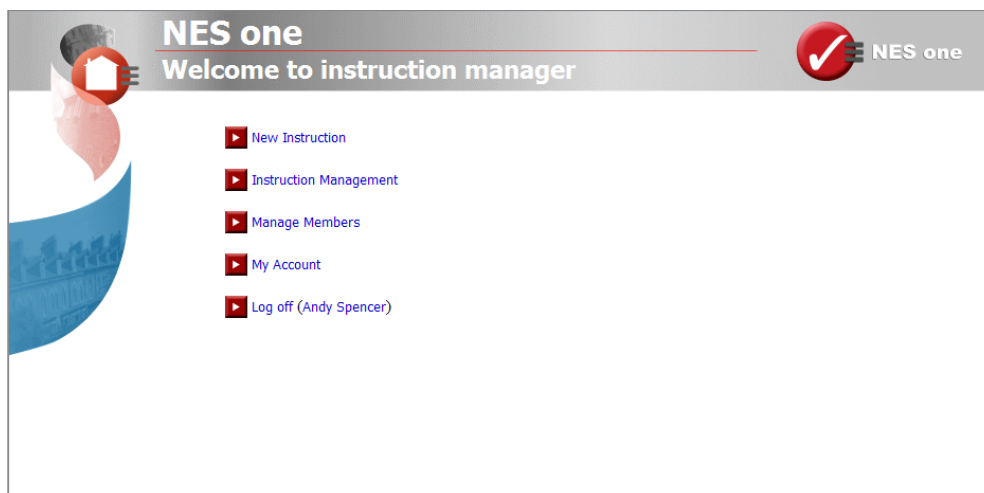
If at any time you need assistance using the NES one Service, or have any queries or need to resolve a problem, please email support@nesltd.co.uk or call 01908 442105. In the case of email we will do our best to respond within the next working day at the latest and you can, of course, email us at any time.

Yours sincerely

NES one Support Team

Navigate to www.nes-one.co.uk and use the login details provided. You are advised to change your password from the system generated "entry word" emailed to you. You can do this once you are logged in. Please see section 3.6 for an explanation as to how to do this.

You, as a client, are presented with the following main menu on your Home page:



This menu allows for a number of functions (all of which are described in detail in this document):

New Instruction: create and offer a new instruction

Instruction Management: review instructions, view their status, manage them, pass and receive information relating to the instruction and receive the final report.

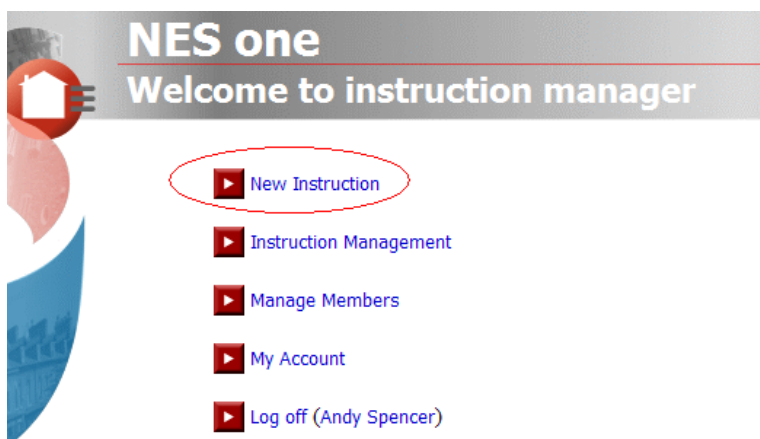
Manage Members: add and remove assessors from your Instruction Manager.

My Account: manage the details of your personal NES one account.

Log off: Log off the NES one system.

3.2Offering a new instruction

To offer a new instruction click **New Instruction:**



Clicking this link displays the following page:

Create new instruction

Instruction

Report:*

Assessor:*

Property type:*

No. of bedrooms:*

Your reference:*

Key location:*

Instruction address

House number / Name:*

Street:*

Locality:

Town / City:

Postcode:*

Main contact for access

Contact type:*

Contact name:*

Preferred phone:*

Other phone:

Contact e-mail:

☐ **Contact 2 (Optional)**

Contact type:*

Contact name:*

Preferred phone:*

Other phone:

Contact e-mail:

☐ **Contact 3 (Optional)**

Contact type:*

Contact name:*

Preferred phone:*

Other phone:

Contact e-mail:

Useful notes

Max. 100 characters.

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This page allows for the entry of all the details of the instruction. This data entry is described in outline here:

3.2.1 Instruction

Create new instruction

Instruction

Report:*

Assessor:*

Property type:*

No. of bedrooms:*

Your reference:*

Key location:*

Instruction address

House number / Name:*

Street:*

Locality:

Town / City:

Postcode:*

Main contact for access

Contact type:*

Contact name:*

Preferred phone:*

Other phone:

Contact e-mail:

☐ **Contact 2 (Optional)**

Contact type:*

Contact name:*

Preferred phone:*

Other phone:

Contact e-mail:

☐ **Contact 3 (Optional)**

Contact type:*

Contact name:*

Preferred phone:*

Other phone:

Contact e-mail:

Useful notes

All of the fields within this section of a new instruction are mandatory:

Report: select the report type

Create new instruction

Instruction		Instruction a	
Report:*	-- Select --	House number	
Assessor:*	-- Select --	Street:*	
Property type:*	Commercial EPC Level 3	Locality:	
No. of bedrooms:*	Commercial EPC Level 4	Town / City:	
Your reference:*	Commercial EPC Level 4 On Construction	Postcode:*	
Key location:*	DEC Advisory Report		
	Display Energy Certificate		
	Display Energy Certificate + Advisory Report		
	Energy Performance Certificate		
	Home Condition Report		
	Home Condition Survey (Buyer)		
	Northern Ireland Energy Performance Certificate		
	Scottish Energy Performance Certificate		
Main contact for a		nal)	
Contact type:*		Estate Agent	
Contact name:*		Contact name:*	
Preferred phone:*		Preferred phone:*	
Other phone:		Other phone:	

Assessor: select the assessor to do the report. The list of available assessors will be qualified by the type of report requested.

Create new instruction

Instruction		Instruction	
Report:*	Energy Performance Certificate	House number	
Assessor:*	-- Select --	Street:*	
Property type:*	-- Select --	Locality:	
No. of bedrooms:*	Smith, Mr Andrew	Town / City:	
Your reference:*		Postcode:*	
Key location:*	-- Select --		
Main contact for access		<input type="checkbox"/> Contact 2 (Optional)	

Property type: select the type of property to be surveyed from the 4 types available.

Instruction	
Report:*	Home Condition Report
Member:*	Smith, Mr Andrew
Property type:*	-- Select --
No. of bedrooms:*	-- Select --
Your reference:*	House
Key location:*	Flat
	Bungalow
	Maisonette

No. of bedrooms: select the number of bedrooms within the property.

Instruction

Report:* Home Condition Report

Member:* Smith, Mr Andrew

Property type:* House

No. of bedrooms:* -- Select --

Your reference:* -- Select --

Key location:* 0
1
2
3
4
5
6
7
8+

Main contact for a

Contact type:* Contact typ

Contact name:* Contact nai

Preferred phone:* Preferred p

Your reference: enter any reference number you might have for this instruction.

Instruction

Report:* Energy Performance Certificate

Assessor:* Smith, Mr Andrew

Property type:* House

No. of bedrooms:* 3

Your reference:*

Key location:* -- Select --

Key location: select the most appropriate location. NB: there is a **Useful notes** field at the bottom of the screen which can and should be used to enter additional information.

Instruction

Report:* Energy Performance Certificate

Assessor:* Smith, Mr Andrew

Property type:* House

No. of bedrooms:* 3

Your reference:* 1234567/AB

Key location:* -- Select --

Main contact for a

Contact type:* At Property
At Estate Agent
At Client Owner
Other

Contact name:*

☐ **Contact 2 (**

3.2.2 Instruction address

Having completed the mandatory information the address of the property needs entering:

Create new instruction

Instruction

Report:* Energy Performance Certificate

Assessor:* Smith, Mr Andrew

Property type:* House

No. of bedrooms:* 3

Your reference:* 1234567/AB

Key location:* At Property

Instruction address

House number / Name:*

Street:*

Locality:*

Town / City:*

Postcode:*

Main contact for access

Contact type:* Vendor

Contact name:*

☐ **Contact 2 (Optional)**

Contact type:* Estate Agent

Contact name:*

☐ **Contact 3 (Optional)**

Contact type:* Other

Contact name:*

House number/Name, Street and Postcode are mandatory:

Instruction address

House number / Name:*	55
Street:*	Any Street
Locality:	
Town / City:	London
Postcode:*	NW4 8UT

3.2.3 Contacts

Access contact information for the use of the assessor has to be entered. At least one contact is required but optionally two more can be entered. The more information that is given here the better, as good contact information will expedite the making of the appointment for the inspection and indeed the report itself:

Create new instruction

Instruction

Report: * Energy Performance Certificate
Assessor: * Smith, Mr Andrew
Property type: * House
No. of bedrooms: * 3
Your reference: * 1234567/AB
Key location: * At Property

Instruction address

House number / Name: * 55
Street: * Any Street
Locality:
Town / City: London
Postcode: * NW4 8UT

Main contact for access ☐ **Contact 2 (Optional)** ☐ **Contact 3 (Optional)**

Contact type: * Vendor
Contact name: *
Preferred phone: *
Other phone:
Contact e-mail:

Contact type: * Estate Agent
Contact name: *
Preferred phone: *
Other phone:
Contact e-mail:

Contact type: * Other
Contact name: *
Preferred phone: *
Other phone:
Contact e-mail:

Useful notes

Firstly select the **Contact type**:

Main contact for access

Contact type:*	Vendor
Contact name:*	Vendor
Preferred phone:*	Estate Agent
Other phone:	Conveyencer
	Family / Neighbour
	Other
Contact e-mail:	

Then complete the rest of the fields for the main contact for access. Note that **Contact name** and **Preferred phone** (i.e. at least one phone number) are mandatory:

Main contact for access ☐ Contact 2 (Optional) ☐ Contact 3 (Optional)

Contact type:* Contact name:*
 Preferred phone:* Other phone:
 Contact e-mail:

Useful notes

A second and third contact can be entered by clicking the check box next to the heading for each:

☒ **Contact 2 (Optional)** ☐ **Contact 3 (Optional)**

Contact type:* Contact name:*
 Preferred phone:* Other phone:
 Contact e-mail:

Information for each is entered in the same way as for the first contact.


3.2.4 Notes

The final step in creating a new instruction is to enter any notes or additional information you might have that would aid the assessor in completing this instruction:

Contact e-mail: Contact e-mail: Contact e-mail:

Useful notes

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Note the  symbol. Clicking this symbol (wherever seen in the system) provides relevant information about the current section. In this case the following:

The useful notes section is used to record any extra details required for the inspector to complete this instruction.

Click **Confirm** to confirm and send the instruction to the assessor or **Cancel** to throw it away:

Create new instruction NES one

Instruction

Report: Energy Performance Certificate
 Assessor: Smith, Mr Andrew
 Property type: House
 No. of bedrooms: 3
 Your reference: 1234567/AB
 Key location: At Property

Instruction address

House number / Name: 55
 Street: Any Street
 Locality: London
 Town / City: London
 Postcode: NW14 8UT

Main contact for access

Contact type: Vendor
 Contact name: Adrian Vend
 Preferred phone: 02074444444
 Other phone:
 Contact e-mail:

☒ **Contact 2 (Optional)**

Contact type: Estate Agent
 Contact name: Anthony Agent
 Preferred phone: 0207666666666
 Other phone: 0799999999999
 Contact e-mail:

☐ **Contact 3 (Optional)**

Contact type: Other
 Contact name:
 Preferred phone:
 Other phone:
 Contact e-mail:

Useful notes

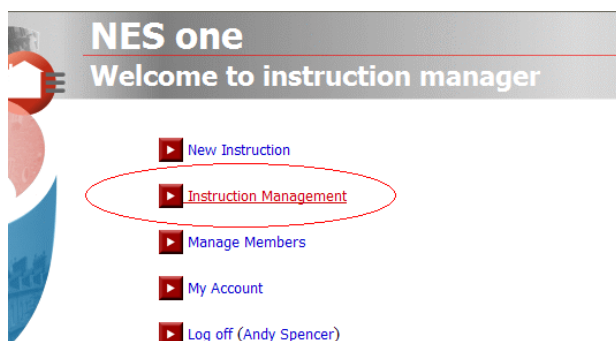
These are useful notes.....

[Cancel](#) [Confirm](#) [Terms and conditions - Slip](#)

The assessor will receive an alert on their welcome screen on their next login to NES one and an SMS text message alerting them to the arrival of the instruction. See the next section to learn how to manage the instruction and track its progress.

3.3 Instruction management/statuses

The Instruction Management menu item allows you to review instructions, view their status, manage instructions, pass and receive information relating to the instruction and receive the final report. Click Instruction Management on your home page:



3.3.1 Viewing instructions

A screen listing your instructions appears:

Instruction management

Status: ☒ Offered ☒ Delivered
☒ Accepted ☒ Cancelled
☒ Appointment made ☒ Unassigned

Date options: From: To:

Action	Reference	Report id	Address	Report type	Status
View	1234569	Report	55 Any Street, London, NW4 8UT	EPC	Delivered
Previous Next					

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In the example above only one instruction is showing and the list can obviously be much longer. This screen allows you to filter/search your list of instructions as well as view them. The filters are at the top of the screen:

Instruction management

Status: ☒ Offered ☒ Delivered
☒ Accepted ☒ Cancelled
☒ Appointment made ☒ Unassigned

Date options: From: To:

Action	Reference	Report id	Address	Report type	Status
View	1234569	Report	55 Any Street, London, NW4 8UT	EPC	Delivered
Previous Next					

The key purpose of using the filters or search options is to reduce the size of the list. The default is that all instructions are displayed.

The list can be filtered by the status of the instruction (see further down this section for an explanation of statuses). To refine the list using status switch off the statuses you do not wish to view by un-checking the tick boxes:

Instruction management

Status: ☒ Offered ☒ Delivered
☒ Accepted ☐ Cancelled
☒ Appointment made ☐ Unassigned

Date options: From:

Action	Reference	Report id	Address
View	1234569	Report	55 Any Street, London, NW4 8UT
Previous Next			

The list can also be searched or refined using date options:

The default is to show instructions irrespective of the Appointment date or Delivered date. Selection of either of these two options allows you to enter a range of dates. The Appointment date is the date specified by the assessor as to when the inspection is scheduled for or took place. The Delivered date is the date the EPC or other report was lodged on the Central Register. Using date options is a particularly useful way to see for example all completed reports for a month (in conjunction with just using that status):

To enter the dates shown above use the calendar control located beside each date box, or type the date in the format below:

Once the desired search options are selected click **Search** to action the filter. Click **Reset** to restore the defaults.

The statuses are as follows:

Offered: the instruction has been offered to an assessor but has not yet been accepted or rejected.

Accepted: the assessor has accepted the instruction but the appointment is not yet made.

Appointment made: the appointment has been set but the report has not yet been lodged (it may have been started).

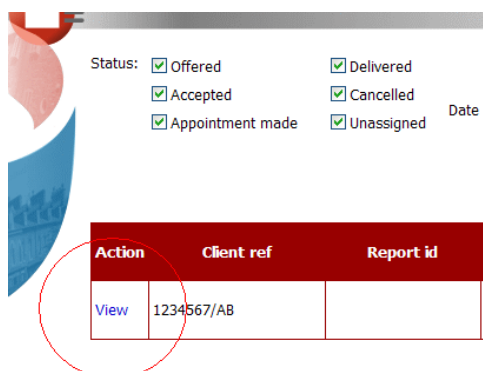
Delivered: the report has been lodged and is retrievable.

Cancelled: the instruction has been cancelled.

Unassigned: the instruction has been rejected by the assessor to whom it was assigned and needs to be re-assigned.

3.3.2 Instruction details

To view the details of an instruction click the **View** link at the beginning of the line:



Clicking the link displays the instruction detail:

Manage instruction NES one

Property House **Address** 55 Any Street
Report Energy Performance Certificate London
Report id N/A NW4 8UT
Client ref 1234567/AB
Client Spencer, Mr Andy
Instructed to Smith, Mr Andrew
Bedrooms 3
Status Offered

Main contact Vendor
Contact name Adrian Vend
Preferred phone 02074444444
Other phone
Contact e-mail

All contacts

Add a note to the instruction

Note

Cancel appointment

Back **View history / notes** [Terms and conditions - Support](#)

Property and contact details are shown at the top of the screen (1). The status of the instruction is displayed (2). This instruction has been “**Offered**” to an assessor and has not yet been accepted or rejected (see section .4 below for more about statuses and managing instructions).

There can be up to three contacts for an instruction. Click the **All contacts** button (3) to see the second and third contacts.

The **Note** section (4) is used to pass information between the client and the assessor. It can be used by either party at any time.

Click **View history/notes** (5) to view the progress that the instruction has made and any notes that have been added previously:

Instruction history NES one

History information about the current instruction

Date	Modified by	Status	Note
7/10/2008 5:08:05 PM	Spencer, Mr Andy	Offered	These are useful notes.....
7/10/2008 5:08:05 PM	Spencer, Mr Andy	Offered	Instruction offered to inspector

Previous Next

Various buttons will appear under the Notes section (6) relating to the appointment depending on the status of the instruction – see section 3.4 below.

Click **Back** (7) to return to your list of instructions.

3.4 Managing the instruction/statuses

The example instruction shown above is one that has been offered to an assessor, i.e. it has been set up and despatched. The status is shown as “Offered”. This section will explore how that instruction progresses and how it can be managed.

The assessor will have received notification of the instruction and will either accept or reject the instruction. Either action will change its status. If it is rejected it will become “Unassigned” and will need to be assigned to another assessor. The following example assumes that the instruction has been accepted.

Manage instruction

Property House **Address** 55 Any Street
London NW4 8UT **Main contact** Vendor
Report Energy Performance Certificate **Contact name** Adrian Vend
Report id N/A **Preferred phone** 02074444444
Client ref 1234567/AB **Other phone**
Client Spencer, Mr Andy **Contact e-mail**
Instructed to Smith, Mr Andrew **All contacts**
Bedrooms 3
Status Accepted
Set an appointment
Appointment Date (dd-mm-yyyy) Time (HH:MM) **Clear appointment**
Add a note to the instruction
Note

Its status changes to “Accepted” (1). However in this example the appointment has not yet been set by the assessor (2).

Once the assessor has set the appointment the instruction shows in the list of instructions as follows:

Status: ☒ Offered ☒ Delivered
☒ Accepted ☒ Cancelled
☒ Appointment made ☒ Unassigned
Date options: All From: To:
dd-MMM-yyyy dd-MMM-yyyy
Reset Search

Action	Reference	Report id	Address	Report type	Status
View	1234567/AB		55 Any Street, London, Nw4 8UT	EPC	Appointment made
View	1234569	Report	55 Any Street, London, NW4 8UT	EPC	Delivered
View	1234567/AB		55 Any Street, London, Nw4 8UT	EPC	Cancelled

Previous Next

The status shows “Appointment made” (1). Click the **View** link next to the reference to view the detail (2):

Manage instruction NES one

Property: House
Report type: Energy Performance Certificate
Report id: N/A
Bedrooms: 3
Instructed to: Smith, Mr Andrew
Reference no: 1234567/AB
Inspector tel: 0870 837 6565
Inspector e-mail: andrew.spencer123@tiscali.co.uk
Status: Appointment

Main contact: Vendor
Contact name: Adrian Vend
Preferred phone: 02044444444
Other phone:
Contact e-mail:

Address: 55 Any Street
 London
 Nw4 8UT

Set an appointment
 Appointment: Date: 06-Oct-2008 (dd-MMM-yyyy)
 Time: 18:30 (HH:mm)

Add a note to the instruction
 Note:
 Max. 100 characters.

Buttons: All contacts, Cancel appointment, Add note, Cancel instruction, View history / notes, Back, Terms and conditions - Support - f

The details of the appointment are shown (1). You can cancel the instruction at any time by clicking the **Cancel instruction** button. Alternatively click **Back** to exit the instruction without making any changes.

You may add a note at any stage by typing in the **Note** box and clicking **Add note** (3).

Click **View history/notes** (4) to view the history of this instruction and any added notes:

Instruction history NES one

History information about the current instruction

Date	Modified by	Status	Note
06/10/2008 17:16:14	Spencer, Mr Andy	Appointment made	This appointment will be met
06/10/2008 17:07:38	Smith, Mr Andrew	Appointment made	Appointment made - 06-Oct-2008 18:30
06/10/2008 15:29:21	Smith, Mr Andrew	Accepted	Instruction accepted
06/10/2008 15:27:30	Spencer, Mr Andy	Offered	Instruction offered to inspector
06/10/2008 15:27:30	Spencer, Mr Andy	Offered	Ring vendor after 6pm

Previous Next

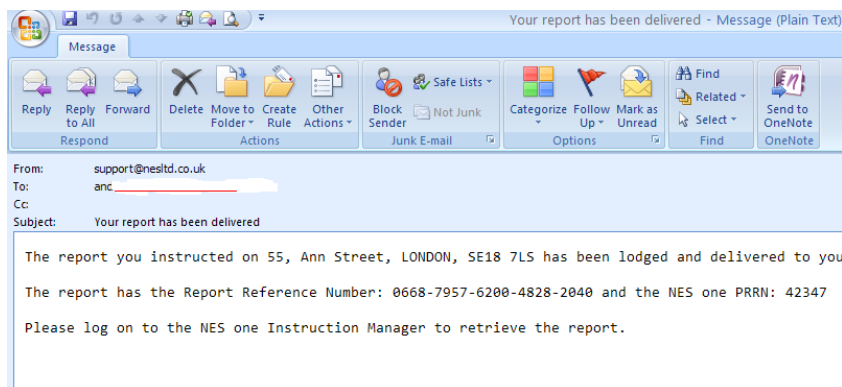
Back

Click **Back** to return to the instruction.

From this status the assessor will proceed to write their report and once lodged the status of the instruction will change to **"Delivered"** and notification by email will be forwarded to you that the report is available to be picked up. This is achieved as follows:

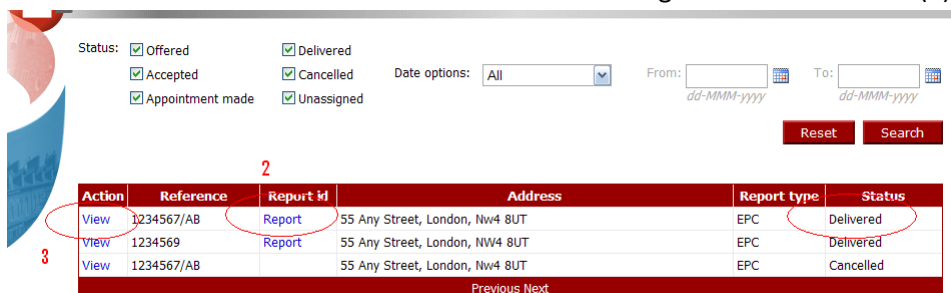
3.5 Receiving the EPC or report

Firstly you will receive an email advising you that the report is delivered and asking you to log in to NES one and Instruction manager to obtain the report:

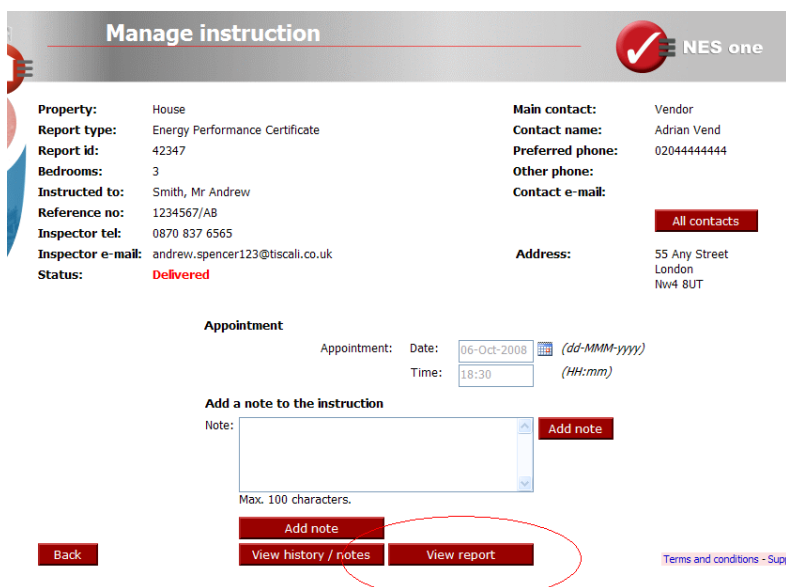


Note that email gives both the official Report Reference Number (RRN) that will be on the report and the internal NES one PRRN (Provisional Report Reference Number).

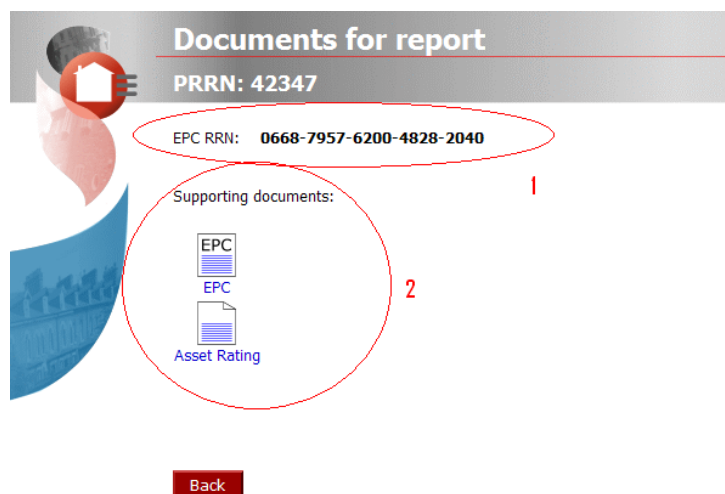
Your list of instructions shows the status **“Delivered”** against the instruction (1):



You can retrieve the report by clicking the **Report** link (2). Alternatively click **View** (3) to achieve a similar result:



Click **View report** to collect the report:



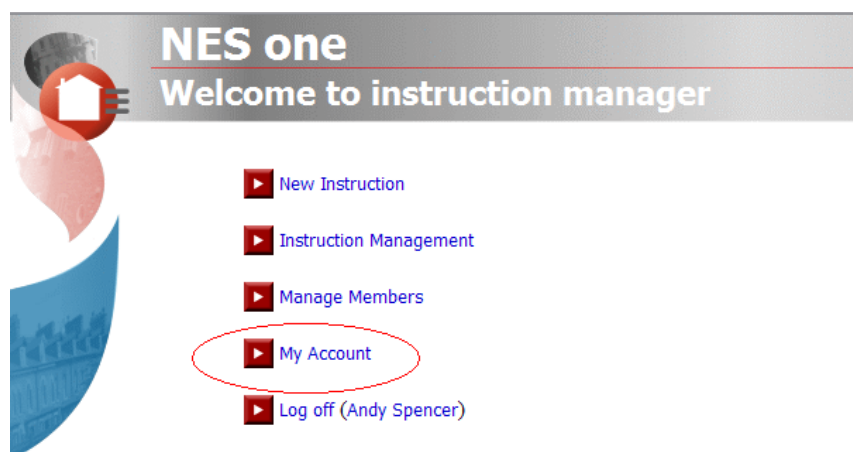
The RRN is shown (1). Two icons are shown (2). These are icons for the report itself (in this case an Energy performance Certificate (EPC)) and because it is an EPC for an existing dwelling an Asset Rating is displayed as well. The contents of this screen will change according to the product that has been instructed and delivered. Click on the icons to retrieve the pdf (or file in a relevant different format – for example the Asset Rating is a .png graphics file for use in particulars).

This stage completes the end to end lifecycle of an instruction.

3.6 Personal details – My Account

As a client user you can manage your login details and your other personal and corporate information.

Navigate to your home/welcome page:



To view and/or change your information click the **My Account** link:

My account

Client company name:* XYZ Estate Agents

Client company address:* 12 Any Street

Locality:

Town / City:* London

County:

Postcode:* NW5 4DW

Title:* Mr

First name:* Andy

Last name:* Spencer

Telephone:* 020723692369

Mobile:

E-mail:* andy.spencer@boltblue.com

Website:

Password:* Acceptable


Repeat password:*

Cancel Save changes

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Any of the information within this screen can be changed by you. Note that items marked with a red asterisk are mandatory items.

To change your email address (which is also your user name) click into that field; highlight the email address and overtype. Click **Save changes** to exit the screen and save the change. To discard the changes made on this screen and return to the main menu click **Cancel**.

You are advised to change the password initially assigned to you as it is system generated and not easily remembered. To change your password click into the first **Password** field and overtype the dots. Repeat the action with the **Repeat password** field. Click **Save changes** to exit and save the change. You will note that there is a strength indicator beside the password field. You will not be allowed to save a “Weak” password. To understand the strength indicator levels click the  button next to the field:

Telephone:* 020723692369

Mobile:

E-mail:* andy.spencer@boltblue.com

Website:

Password:* Acceptable

Repeat password:*


This displays the following information:

Telephone: 020723692369

Mobile:

E-mail: andy.spencer@boltblue.com

Website:

Password:  Acceptable

The password strength is split into 4 levels, Best, Strong, Acceptable and Poor.

The **Best** rating applies if the password is between 14 and 20 characters (Inclusive) and contains characters from each of the four character sets. (Character sets defined below.)

A **Strong** rating applies if the password is between 8 and 20 characters (Inclusive) and contains characters from only three character sets.

An **Acceptable** rating applies if the password is between 8 and 20 characters (Inclusive) and contains characters from only two character sets. Alternatively the password is between 10 and 20 characters and contains characters from only one character set.

A **Weak** rating will apply if the password fails to meet all the other levels, or is contained in our list of weak passwords.

Character sets:
[A-Z], [a-z], [0-9], [Other Printable Characters]

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The information that is displayed explains each level.

4. Instruction Manager for the assessor

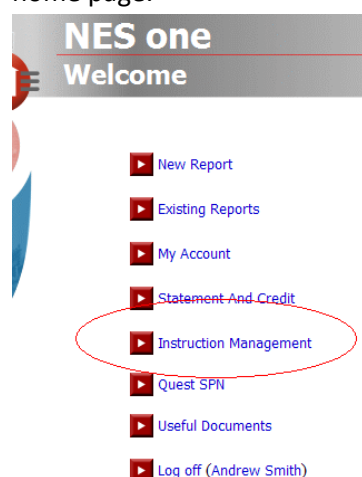
This section describes Instruction Manager from the perspective of the assessor. Crucially it is the assessor that initiates relationships with clients and the process for doing this is described in section 4.1. The remainder of the section describes how to manage instructions and deliver your reports to the client.

4.1 Setting up a new client/relationship

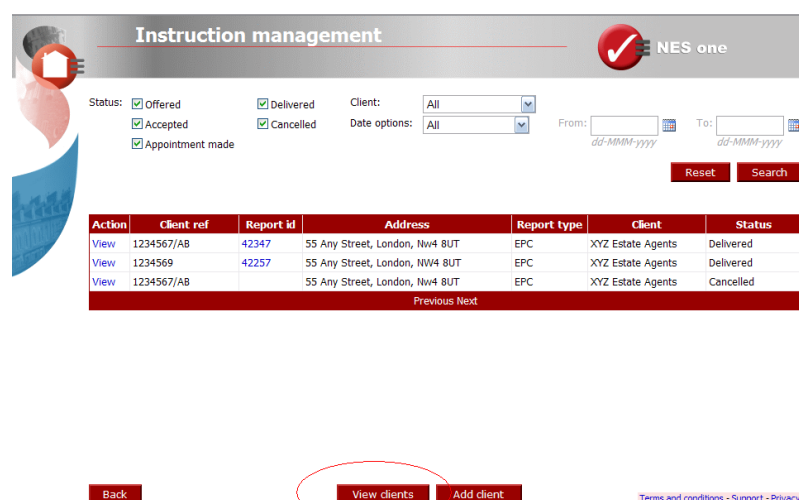
A new client can be set up at any time and there is no limit on the number of clients you may have set up and indeed active at any one time.

4.1.1 Viewing clients already set up

In order to view clients that you already have set up navigate to Instruction Management from your home page:



Click the **Instruction Management** link:



Your list of existing instructions is displayed together with the filters that enable you to keep the list manageable. Please see section 4.3 below for a more detailed explanation of this screen.

To view clients already set up click **View clients**. This screen is displayed:

Client	Delivered instructions	Status	Status date	Action
AAA Agency	0	Accepted	25/09/2008 14:17:51	Withdraw
XYZ Estate Agents	3	Accepted	29/09/2008 17:02:34	Withdraw

Previous Next

Back Add client

The clients are listed (1). The date the relationship was established and its status is shown (2). The status **Accepted** shows that the relationship has been accepted by both parties. The number of instructions that have been completed, i.e. a report delivered to the client is also shown (3).

Click on the client name (1) to see the contact details for that client:

Client company name: * XYZ Estate Agents

Client company address: * 12 Any Street

Locality:

Town / City: * London

County:

Postcode: * NW5 4DW

Title: * Mr

First name: * Andy

Last name: * Spencer

Telephone: * 020723692369

Mobile:

E-mail: * andrew.spencer@boltblue.com

Website:

Back

As an assessor you cannot alter a client's details after the initial set up of that client but you can view them. Click **Back** to return to the list.

4.1.2 Adding a client

A client can be added from the list of existing clients or from the main screen:

Instruction management

Status:
☒ Offered
☒ Delivered
☒ Accepted
☒ Cancelled
☒ Appointment made

Client:
Date options:
From:
To:

Action	Client ref	Report id	Address	Report type	Client	Status
View	1234567/AB	42347	55 Any Street, London, Nw4 8UT	EPC	XYZ Estate Agents	Delivered
View	1234569	42257	55 Any Street, London, NW4 8UT	EPC	XYZ Estate Agents	Delivered
View	1234567/AB		55 Any Street, London, Nw4 8UT	EPC	XYZ Estate Agents	Cancelled

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Click **Add client**:

Add client

Client company name:*

Client company address:*

Locality:

Town / City:*

County:

Postcode:*

Title:*

First name:*

Last name:*

Telephone:*

Mobile:

E-mail:*

Website:

[View Terms & Conditions](#)

☐ I agree to the terms and conditions of use of this web site

[Terms and conditions - Support - Privacy](#)

In order to initiate a relationship with a client you need to complete this screen. A red asterisk denotes a mandatory item. An example of a completed screen is shown here:

Add client

Client company name:*

Client company address:*

Locality:

Town / City:*

County:

Postcode:*

Title:*

First name:*

Last name:*

Telephone:*

Mobile:

E-mail:*

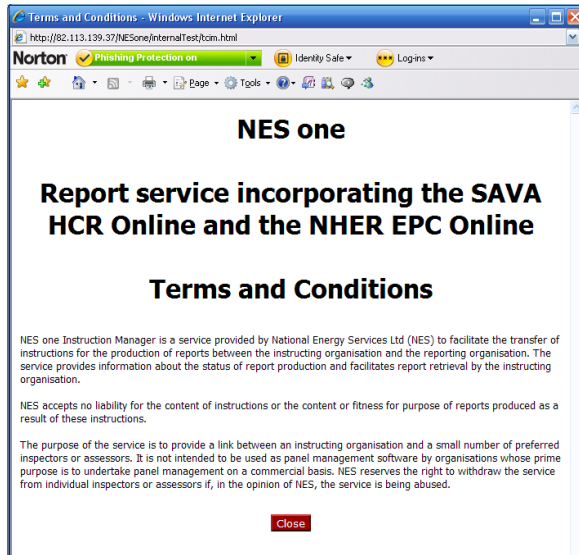
Website:

[View Terms & Conditions](#)

☒ I agree to the terms and conditions of use of this web site

[Terms and conditions - Support - Privacy](#)

Note that the **View Terms & Conditions** box is checked to denote that the terms have been read. These terms govern the use of Instruction Manager specifically and are in addition to those governing the wider use of NES one. To view them click **View Terms & Conditions** (1). They are shown here:

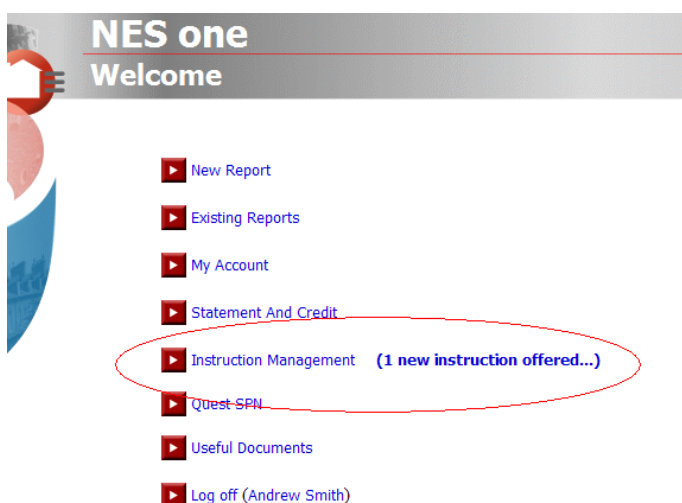


Click **Close** to close this pop up window.

Click **Add client** (2) to add the client, saving the changes to the screen. This initiates an automated email to the client giving them their login details, thereby enabling them to start issuing you with instructions.

4.2 Receiving a new instruction

When an instruction is sent to you, you will receive an SMS text message saying that the instruction has been delivered and giving you the address of the property to be assessed. To accept the instruction you need to log on to NES one:



The offer of the new instruction is shown on your Welcome screen next to the **Instruction Management** menu item. Either click the link to go directly to the instruction or click on the **Instruction Management** link to view the list of instructions (there may be more than one instruction on offer!):

Action	Client ref	Report id	Address	Report type	Client	Status
View	1234567/AB		55 Any Street, London, NW4 8UT	EPC	AAA Agency	Offered
View	444444		127 high street, mk, mk111at	EPC	AAA Agency	Accepted
View	344344343		127 high street, milton keeynes, mk...	EPC	AAA Agency	Accepted

On navigating to the list the instruction on offer is shown as “**Offered**” and is at the top of the list. Bear in mind that the list can be filtered at any time.

Click the **View** link at the left of the instruction:

Property: House
Report type: Energy Performance Certificate
Report id: N/A
Bedrooms: 3
Client: Smith, Mr Don
Client ref: 1234567/AB
Status: Offered

Main contact: Vendor
Contact name: Adrian Vend
Preferred phone: 0207444444
Other phone:
Contact e-mail:

Address: 55 Any Street, London, NW4 8UT

Add a note to the instruction

Note:
 Max. 100 characters.

[Add note](#)

[Accept instruction](#) [Reject instruction](#)
[View history / notes](#)

[Back](#) [Terms and conditions - Si](#)

All of the details of the instruction are displayed. The status is shown (1). To accept the instruction click **Accept instruction**.

The status changes to “**Accepted**” both in your view and the client’s. The instruction can be rejected by clicking the **Reject instruction** button. At any time additional notes can added and the history

viewed. To add a note click in the **Note** section and once you have typed your note click **Add note**. To view the notes and the history of the instruction click **View history / notes**.

Manage instruction

Property: House
Report type: Energy Performance Certificate
Report id: N/A
Bedrooms: 3
Client: Smith, Mr Don
Client ref: 1234567/AB
Status: **Accepted**

Set an appointment

Appointment: Date:

Or in the list:

Instruction management

☒ Offered ☒ Delivered Client:
☒ Accepted ☒ Cancelled Date options:
☒ Appointment made

From: To:

Action	Client ref	Report id	Address	Report type	Client	Status
View	1234567/AB		55 Any Street, London, NW4 8UT	EPC	AAA Agency	Accepted
View	444444		127 high street, mk, mk111at	EPC	AAA Agency	Accepted
View	344344343		127 high street, milton keynes, mk...	EPC	AAA Agency	Accepted
View	hjjghgjhgjh...		1,4 minster road, london, nw23ra	HCR	AAA Agency	Accepted

It should be noted that the instruction can be rejected at any stage of processing the instruction except after it has been **“Delivered”**, i.e. the report has been lodged.

4.3 Making the appointment

Accepting the instruction allows one to move on to making the appointment and completing the instruction.

Once the appointment has been made it is recorded in the instruction:

Manage instruction

Property:

House

Report type:

Energy Performance Certificate

Report id:

N/A

Bedrooms:

3

Client:

Smith, Mr Don

Client ref:

1234567/AB

Status:

Accepted

Main contact:

Vendor

Contact name:

Adrian Vend

Preferred phone:

0207444444

Other phone:

Contact e-mail:

Address:

55 Any Street
London
NW4 8UT

Set an appointment

Appointment:

Date:

(dd-MMM-yyyy)

Time:

(HH:mm)

Add a note to the instruction

Note:

Max. 100 characters.

Add note

Make appointment

Reject instruction

Enter the date and time of the appointment:

Manage instruction

Property:

House

Report type:

Energy Performance Certificate

Report id:

N/A

Bedrooms:

3

Client:

Smith, Mr Don

Client ref:

1234567/AB

Status:

Accepted

Main contact:

Vendor

Contact name:

Adrian Vend

Preferred phone:

0207444444

Other phone:

Contact e-mail:

Address:

55 Any Street
London
NW4 8UT

Set an appointment

Appointment:

Date:

15-Jan-2009

(dd-MMM-yyyy)

Time:

20:00

(HH:mm)

Add a note to the instruction

Note:

Max. 100 characters.

Add note

Make appointment

Reject instruction

Back

View history / notes

Enter the date and time (1). Click the **Make appointment** button (2) to set the appointment. This moves the status to “**Appointment**” and allows for the report to be initiated:

Manage instruction

Property:

House

Report type:

Energy Performance Certificate

Report id:

N/A

Bedrooms:

3

Client:

Smith, Mr Don

Client ref:

1234567/AB

Status:

Appointment

Main contact:

Vendor

Contact name:

Adrian Vend

Preferred phone:

0207444444

Other phone:

Contact e-mail:

Address:

55 Any Street
London
NW4 8UT

Set an appointment

Appointment:

Date:

15-Jan-2009

(dd-MMM-yyyy)

Time:

20:00

(HH:mm)

Add a note to the instruction

Note:

Max. 100 characters.

Add note

Change appointment

Reject instruction

Back

View history / notes

Start report

Page | 27


User Guide – Instruction Manager v1.0

January 2009


To facilitate the entering of the date there is a calendar control next to the date field:

Address: 5
L
N

Set an appointment


Appointment: Date:  (dd-MMM-yyyy)
Time: (HH:mm)

Add a note to the instruction


Note:  **Add note**

Click the link and select the date you need:


Set an appointment

Appointment: Date:  (dd-MMM-yyyy)
Time: (HH:mm)

Add a note to the instruction

Note:  **Add note**

Max. 100 characters.



4.4 Writing the EPC or report and delivering it to the client


Having made the appointment the report can be started and completed:

Report id: N/A
Bedrooms: 3
Client: Smith, Mr Don
Client ref: 1234567/AB
Status: Appointment


Preferred phone: 0207444444
Other phone:
Contact e-mail: **All contacts**

Address: 55 Any Street
London
NW4 8UT

Set an appointment

Appointment: Date: 15-Jan-2009  (dd-MMM-yyyy) **Cancel appointment**
Time: 20:00 (HH:mm)

Add a note to the instruction

Note:  **Add note**

Max. 100 characters.

Back **Change appointment** **Reject instruction** **View history / notes** **Start report** [Terms and conditions - Support](#)

Click **Start report**:

Domestic advanced address locator



Number (or name) **Look up**
Street / Road
Locality
Town / City
Postcode
 55 Ann Street
 LONDON SE18 7LS

Tips for Advanced search address matching:

- Complete at least three lines of the address you want to match.
- Always use the house **number** where one exists rather than the house name.
- Virtually all properties have numbers (even if a name is being used)
- Always input the full street and town names, **do not abbreviate**.
- If a match is still not made on the first attempt, try more searches using different parts of the address (in particular the number and street fields on their own).

Requesting an address to be added should be seen as the last resort.

Once the address has been confirmed it cannot be changed.

Central Register Disclaimer

Energy Assessors are informed that all third party data which the Register provides as part of the Services (including, but not limited to, Post Office Address File (PAF), Met Office Degree Days Data and CIBSE Benchmark Data) is supplied "as is" without any warranty as to its accuracy or completeness. Address related queries can only be resolved if they are raised with Landmark prior to their lodgement into the Register.

If you cannot find the address you are looking for after a number of advanced searches it will need to be added to the system. Once an address has been requested it will appear within 24 Central Register

Clicking this button takes you straight to the advanced address locator and the report writing process is started. The process is the same as for all report writing (and therefore is not documented here). Having stated that however the report type and date of inspection are carried forward:

Report type and date

Type of report
Date of inspection

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

 Inspection date selected is: 15-Jan-2009
Purpose for EPC

Complete the screen and click **Start report**. When all the data has been entered and reviewed the report will be lodged:

Lodge the report
55, Ann Street, LONDON, SE18 7LS
PRRN: 45309

Once the report has been lodged with the Certification Scheme, no further changes can be made. Please ensure that your site notes have been uploaded.

Related Parties Disclosure ☒ No related party disclosure to be made

Pressing Lodge Report may take some time. Please be patient while your documents are generated. Do not refresh the page as this can lead to delays and errors.

Cancel
Lodge Report

Click **Lodge Report**:

Report management
55, Ann Street, LONDON, SE18 7LS
PRRN: 45309

Home
My Account
Useful Documents

Version 5.2.0

RRN: 8171-6229-4500-4245-7096

EnergyData(45309).pdf

EPC(45309).pdf

AssetRating(45309).png

RDSAP 9.82
 Upload documents
There are 3 files uploaded. Click the above link to update this section

RRN of the Lodged EPC: 8171-6229-4500-4245-7096

Copy to clipboard (In order to paste it into, for example, an email)

The normal Report management screen is displayed with icons providing links to the relevant documents.

The list of instructions within Instruction manager shows the instruction as “Delivered”:

Instruction management

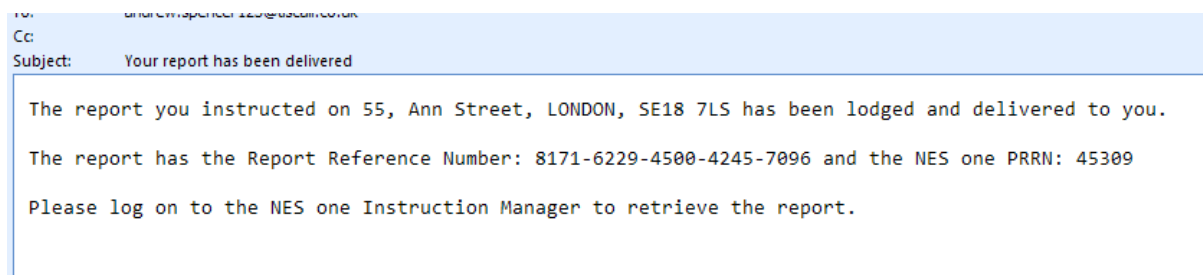
Status: ☒ Offered ☒ Delivered ☐ Accepted ☒ Cancelled ☐ Appointment made

Client: All
Date options: All
From: dd-MMM-yyyy To: dd-MMM-yyyy

Reset Search

Action	Client ref	Report id	Address	Report type	Client	Status
View	444444		127 high street, mk, mk111at	EPC	AAA Agency	Accepted
View	344344343		127 high street, milton keynes, mk...	EPC	AAA Agency	Accepted
View	hjghghghghg...		1,4 minster road, london, nw23ra	HCR	AAA Agency	Accepted
View	5656565666		12 any street, london, nw23ra	EPC	AAA Agency	Accepted
View	66565656565...	44562	127 High Street, Stony Stratford, M...	EPC	AAA Agency	Appointment made
View	1234567/AB	45309	55 Any Street, London, NW4 8UT	EPC	AAA Agency	Delivered
View	1234567/AB	45309	55 Any Street, London, NW4 8UT	EPC	AAA Agency	Delivered

An email has been sent to the client informing them that the report is in this status:



The client's display will show the same status as yours. Click into the instruction via the **View** link and click View report, or go directly to the report via the **Report Id** link to obtain the report:



The above is the view of the documents through Instruction Manager. The client will not see any additional information uploaded by the assessor.

5 Managing relationships

5.1 Managing relationships – the assessor perspective

You, as an assessor, can set up as many clients as you wish. Therefore, if you have preferred supplier relationships with multiple organisations you can establish them as separate clients and manage them through the one interface:

The screenshot shows the 'Instruction management' interface. At the top, there's a header with the title and a red checkmark icon. Below the header, there are filters for Status (Offered, Accepted, Appointment made, Delivered, Cancelled), Client (All), Date options (All), and date ranges (From: dd-MMM-yyyy, To: dd-MMM-yyyy). There are 'Reset' and 'Search' buttons. Below the filters is a table with columns: Action, Client ref, Report id, Address, Report type, Client, and Status. The table contains 10 rows of data. A red circle highlights the 'Client' column, which lists 'AAA Agency' for the first 6 rows and 'XYZ Estate Agents' for the last 4 rows.

Action	Client ref	Report id	Address	Report type	Client	Status
View	444444		127 high street, mk, mk111at	EPC	AAA Agency	Accepted
View	344344343		127 high street, milton keynes, mk...	EPC	AAA Agency	Accepted
View	hjjghjjghjjgh...		1,4 minster road, london, nw23ra	HCR	AAA Agency	Accepted
View	5656565666		12 any street, london, nw23ra	EPC	AAA Agency	Accepted
View	66565656565...	44562	127 High Street, Stony Stratford, M...	EPC	AAA Agency	Appointment made
View	1234567/AB	45309	55 Any Street, London, NW4 8UT	EPC	AAA Agency	Delivered
View	1234567/AB	42347	55 Any Street, London, Nw4 8UT	EPC	XYZ Estate Agents	Delivered
View	1234569	42257	55 Any Street, London, NW4 8UT	EPC	XYZ Estate Agents	Delivered
View	1234567/AB		55 Any Street, London, Nw4 8UT	EPC	XYZ Estate Agents	Cancelled


The above screen shows two clients.

You can withdraw from a relationship at any time, though if there are outstanding instructions you will be required to reject them or finish them before the withdrawal becomes effective.


The screenshot shows the 'Instruction management' interface. At the top, there's a header with the title. Below the header, there are filters for Status (Offered, Accepted, Appointment made, Delivered, Cancelled), Client (All), Date options (All), and date ranges (From: dd-MMM-yyyy, To: dd-MMM-yyyy). There are 'Reset' and 'Search' buttons. Below the filters is a table with columns: Action, Client ref, Report id, Address. The table contains 10 rows of data. Below the table, there are buttons: 'Back', 'View clients', and 'Add'. A red circle highlights the 'View clients' button.

Action	Client ref	Report id	Address
View	444444		127 high street, mk, mk111at
View	344344343		127 high street, milton keynes, mk...
View	hjjghjjghjjgh...		1,4 minster road, london, nw23ra
View	5656565666		12 any street, london, nw23ra
View	66565656565...	44562	127 High Street, Stony Stratford, M
View	1234567/AB	45309	55 Any Street, London, NW4 8UT
View	1234567/AB	42347	55 Any Street, London, Nw4 8UT
View	1234569	42257	55 Any Street, London, NW4 8UT
View	1234567/AB		55 Any Street, London, Nw4 8UT

Navigate to the client list by clicking **View clients**:

Client management 				
Client	Delivered instructions	Status	Status date	Action
AAA Agency	6	Accepted	25/09/2008 14:17:51	Withdraw
Ali's agency	0	Accepted	07/11/2008 12:56:08	Withdraw
XYZ Estate Agents	3	Accepted	29/09/2008 17:02:34	Withdraw
Previous Next				


Your list of clients is displayed. Click **Withdraw** next to the client you wish to terminate the relationship with. The screen below shows the Withdrawn status of the altered relationship:

Client management 				
Client	Delivered instructions	Status	Status date	Action
AAA Agency	6	Accepted	25/09/2008 14:17:51	Withdraw
XYZ Estate Agents	3	Accepted	29/09/2008 17:02:34	Withdraw
Ali's agency	0	Withdrawn	15/01/2009 22:50:04	
Previous Next				

5.2 Managing relationships – the client perspective






The client can manage their assessors. In the first instance an assessor will set up the electronic relationship but from that point on the client is the party that determines who is within the relationship and can invite other assessors to join it. This is to ensure that the client has the service they desire.

You, as the client, can see who is within the relationship that you are the client of:



NES one

Welcome to instruction manager

-  [New Instruction](#)
-  [Instruction Management](#)
-  [Manage assessors](#)
-  [My Account](#)
-  [Log off \(Don Smith\)](#)

From your Welcome screen click the **Manage assessors** link:

Membership Number to add: **Add**

Back

These inspectors can complete instructions

Action	Name	Membership number	Company	Status
Remove	Smith, Mr Andrew	NHER001020	JS Energy Assessments	Accepted
Re-activate	Stanton, Mr Andrew	SAVA001012	A & J Smith Energy Assessors Ltd	Withdrawn

From this screen you can add more assessors to the relationship, remove assessors from the relationship and re-activate assessors who have previously withdrawn or been removed. Each of these actions is considered in turn:

5.2.1 Adding a new assessor

It should be noted that you must have agreed the relationship with the assessor to be added in advance as they will be automatically requested to consent. You will need their membership number. It is also strongly recommended that you agree the addition of new assessors to the relationship with the assessor who originally set it up, though you are not forced to do this.

In order to add a new assessor to your list of assessors enter the membership number in the **Membership Number to add** field:

Membership Number to add: **Add**

Please confirm this is the person you wish to add:

Inspector name: **Smith, Mr Simon**
Inspector company: **PIMSS**

Confirm **Clear**

Back

These inspectors can complete instructions

Action	Name	Membership number	Company	Status
Remove	Smith, Mr Andrew	NHER001020	JS Energy Assessments	Accepted
Re-activate	Stanton, Mr Andrew	SAVA001012	A & J Smith Energy Assessors Ltd	Withdrawn

Enter the membership number (1). Click the **Add** button (2). The name and company of the assessor you are wishing to add appears (3). Click **Confirm** to action the request to join (4):

Manage users for client

Membership Number to add:

[Back](#)

These inspectors can complete instructions

Action	Name	Membership number	Company	Status
Remove	Smith, Mr Andrew	NHER001020	JS Energy Assessments	Accepted
	Smith, Mr Simon	NHER001070	PIMSS	Unassigned
Re-activate	Stanton, Mr Andrew	SAVA001012	A & J Smith Energy Assessors Ltd	Withdrawn

This request is sent to the assessor who has to consent to join the relationship, at which point the status will change to “Accepted”. They will be alerted to the request on logging into NES one:

NES one

Welcome

- [New Report](#)
- [Existing Reports](#)
- [My Account](#)
- [Statement And Credit](#)
- [Instruction Management \(A new client has contacted you...\)](#)
- [Quest SPN](#)
- [Useful Documents](#)

The assessor clicks the “A new client....” link:

Accept a new client

'AAA Agency' would like to offer you instructions and is inviting you to join their Instruction Manager.

If you are in agreement to joining please agree to give your contact details to 'AAA Agency' and agree to the terms and conditions after reading them.

1

Organisation: AAA Agency
Organisation Contact: Smith, Mr Don
Telephone:
E-mail: don.smith@aaaagency.com
Website:

[View Terms & Conditions](#) **2**

☐ I agree to let my contact details be displayed to this client
☐ I agree to the terms and conditions of use of this web site

3

[Back](#)

[Terms and conditions](#) - [Support](#) - [Privacy](#)

The assessor can see who is contacting them to offer instructions. They can accept the delivery of contact details to you and the terms. They either **Accept** or **Decline** the invitation to join the relationship by clicking the relevant button.

5.2.2 Removing an assessor

An assessor can be removed from the relationship from within the list of assessors in the relationship:

The screenshot shows the 'Manage users for client' interface. At the top, there is a header bar with a red checkmark icon and the text 'NES'. Below the header, there is a form with a label 'Membership Number to add:' and an 'Add' button. Below the form, there is a 'Back' button. Below the 'Back' button, there is a red circle around the text 'These inspectors can complete instructions'. Below this text, there is a table with the following data:

Action	Name	Membership number	Company	Status
Remove	Smith, Mr Andrew	NHER001020	JS Energy Assessments	Accepted
	Smith, Mr Simon	NHER001070	PJMSS	Unassigned
Re-activate	Stanton, Mr Andrew	SAVA001012	A & J Smith Energy Assessors Ltd	Withdrawn

Click the **Remove** link next to the assessor to be removed from the list:

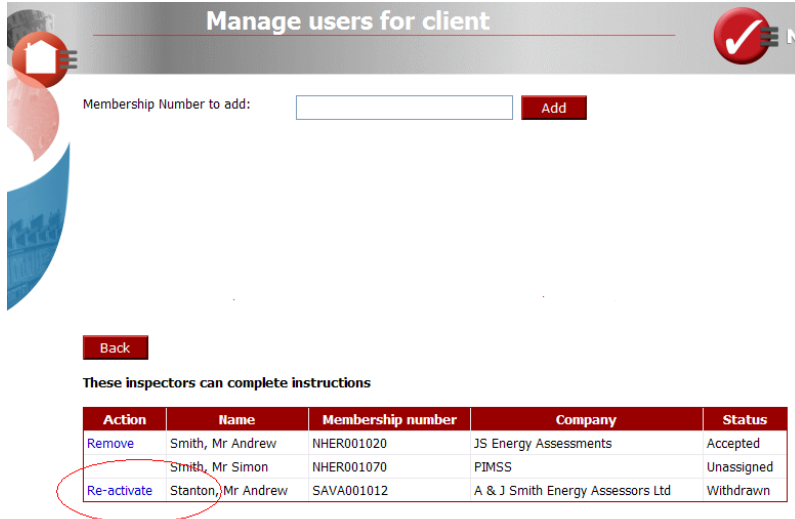
The screenshot shows the 'Manage users for client' interface. At the top, there is a header bar with a red checkmark icon and the text 'NES one'. Below the header, there is a form with a label 'Membership Number to add:' and an 'Add' button. Below the form, there is a 'Back' button. Below the 'Back' button, there is a red message box with the text: 'This assessor cannot be withdrawn yet as they still have 5 instructions in progress for you.' Below the message box, there is a 'Back' button. Below the 'Back' button, there is a red circle around the text 'These inspectors can complete instructions'. Below this text, there is a table with the following data:

Action	Name	Membership number	Company	Status
Remove	Smith, Mr Andrew	NHER001020	JS Energy Assessments	Accepted
	Smith, Mr Simon	NHER001070	PJMSS	Unassigned
Re-activate	Stanton, Mr Andrew	SAVA001012	A & J Smith Energy Assessors Ltd	Withdrawn

If there are outstanding instructions you cannot complete the removal. If there are no outstanding instructions the status of this assessor will be reset to "Withdrawn" and the "Re-activate" flag set.

5.2.3 Re-activating an assessor

To re-activate an assessor click the **Re-activate** link next to their name:



Membership Number to add:

These inspectors can complete instructions

Action	Name	Membership number	Company	Status
Remove	Smith, Mr Andrew	NHER001020	JS Energy Assessments	Accepted
	Smith, Mr Simon	NHER001070	PIMSS	Unassigned
Re-activate	Stanton, Mr Andrew	SAVA001012	A & J Smith Energy Assessors Ltd	Withdrawn

This has the effect of re-inviting them to join the relationship.